

# Strategic Planning Meets Strategic Execution Toolkit

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From the Drawing Board to the Dashboard

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Strategic Plan Template

Promotional Strategic Plan  
Template

Action Plan Template

Dashboard Template

Resources and Tools

# Strategic Planning Meets Strategic Execution

## *From the Drawing Board to the Dashboard*

### Strategic Plan Template

Use this template to establish measureable goals and overall strategies for achieving the strategic objectives of the organization. Essentially this is the strategic plan of the organization.

### Promotional Strategic Plan Template

Promotional Strategic Plan Template - Use this document to promote the strategic plan to the membership

### Action Plan Template

Use this document to establish an action plan to achieve desired goals and objectives; this is a working document for staff, committee and board volunteers

### Dashboard Template

Use this template to track performance measurements and targets. This template is an excellent resource Board updates as a quick snapshot of where the organization is in achieving its goals.

### Resources and Samples

An article on strategic execution by Bill Pawlucy, CAE, founder of Association Options, Inc. as well as additional dashboard samples and examples for keeping the strategic goals top of mind.

Association Options, Inc. focuses on practical strategic planning (corporate and nonprofit), management assessments, Baldrige Award process implementation, AMC search and evaluation, facilitation and governance modeling. Learn more at [www.AssociationOptions.com](http://www.AssociationOptions.com).



## [Organization] Strategic Plan 2013 – 2015

*Use this template to establish measureable goals and overall strategies for achieving the strategic objectives of the organization. Essentially this is the strategic plan of the organization.*

Strategic Goal/Objective	Strategy	2013	2014	2015
<b>Grow and diversity our membership</b>	<b>Establish a vendor member category</b>	Create vendor membership program.  Attract 50 new vendor members.	Focus on continued recruitment efforts and identify retention plan  100 vendor members (new and renewals)	Continue recruitment and retention efforts  200 vendor members (new and renewals)
	<b>Establish an affiliate member category</b>	[Performance measurement year 1]	[Performance measurement year 2]	[Performance measurement year 3]
	<b>Expand recruitment efforts</b>	[Performance measurement year 1]	[Performance measurement year 2]	[Performance measurement year 3]
	<b>Improve retention plan and follow up with renewals</b>	[Performance measurement year 1]	[Performance measurement year 2]	[Performance measurement year 3]
<b>[GOAL 2]</b>				



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# 2013 – 2015 Strategic Plan

*Use this document to promote the strategic plan to the membership*

## Mission

*[Organization's Mission]*

### Membership

*Grow and diversity membership*

- Establish a vendor member category
- Establish affiliate member category
- Expand recruitment efforts
- Improve retention plan and follow up with non-renewals

### [Area of Work]

*[Goal]*

- Strategy 1
- Strategy 2
- Strategy 3

### [Area of Work]

*[Goal]*


- Strategy 1
- Strategy 2
- Strategy 3

### [Area of Work]

*[Goal]*

- Strategy 1
- Strategy 2
- Strategy 3

[Organization] Strategic Plan Action Plan 2013							
Project Manager: [Executive Director]							
Project Team Members: [Committee Members, Board Members, Staff, Consultants]							
Goals, Strategies and Tactics to Achieve Goals		Task Owner	Contributors	Due Date	Status	Actual Completion Date	Target
Goal: Grow and diversify membership							
Tactic: Establish vendor member category							Establish Membership Category by June 2013; 50 vendor members by December 2013
1	Research vendor membership of competing and partner organizations	[Name]	Membership Committee	2/15/13	Complete	2/13/2013	
2	Define vendor membership	[Name]	Membership	3/1/13	Complete	3/5/2013	
3	Establish vendor member benefits	[Name]	Membership	3/10/13	Complete	3/10/2013	
4	Determine vendor member pricing	[Name]	Membership	4/1/13	Complete	3/31/2013	
5	Create vendor member brochure	[Name]	Membership	5/15/13	Complete	5/13/2013	
6	Identify vendor prospects	[Name]	Membership	5/15/13	In process		
7	Distribute vendor brochure via email	[Name]	Membership	6/1/13	Not		
8	Follow up phone calls to prospects	[Name]	Membership	6/15/13	Not		
Tactic: Establish affiliate member category							100 affiliate members by December 2013
1	Task 1						
2	Task 2						
3	Task 3						
4	Task 4						
5	Task 5						
6	Task 6						
Goal: [Current Year Goal]							
Tactic [Enter tactic/strategy to achieve goal]							
1	Task 1						
2	Task 2						

3	Task 3						
4	Task 4						
5	Task 5						
6	Task 6						
<i>cument to establish an action plan to achieve desired goals and objectives; this is a working document for staff, committee and board</i>							
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## [Organization] Strategic Plan DashBoard 2013 – 2015

Strategic Goal/Objective	Actions/Strategies	2013 Target/Measure	Leader	% Complete YTD	Status Update
1. Grow and Diversity our Membership	1.1 Establish a vendor member category	Create a vendor member category	Joe Membership	<span style="color: green;">●</span> 100%	Cateogry created
		Attract 50 new members	Joe Membership	<span style="color: red;">●</span> 10%	5 members
	1.2 Establish an affiliate member category	[Enter target 1]			
		[Enter target 2]			
		[Enter target 3]			
	1.3 Expand recruitment efforts	[Enter target 1]			
		[Enter target 2]			
		[Enter target 3]			
	1.4 Improve retention efforts and renewal follow up	[Enter target 1]			
		[Enter target 2]			
		[Enter target 3]			

### Color Coding:

- 84% or above
- 56-83%
- 55% or less

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*Use this template to track performance measurements and targets. This template is an excellent resource Board updates as a quick snapshot of where the organization is in achieving its goals.*



## Resources

[Home](#) > [Resources](#)

# Strategic Planning, Meet Strategic Execution

July 8, 2013

By: Bill Pawlucy, CAE

Strategic planning is the first step in the execution of an overall plan. The strategic plan establishes a key process approach to begin thinking about the future of the organization. If the strategic plan is a process, then what is a logical approach to monitoring and tracking results? The results of a strategic plan live in a dashboard that is customized by the organization executing the strategic plan.

The strategic planning dashboard is a tool that provides a snapshot of the organization's progress to its strategic plan at a certain point in time. It monitors execution from the first day that the strategic plan is deployed within the organization. The dashboard is important in that it does the following:

1. keeps staff on track and focused on the plan
2. provides the volunteer leaders that are champions of the plan's actions a dashboard to monitor progress to the plan
3. provides the board with a tool that succinctly sums up progress and allows the board to concentrate on a path moving forward rather than wading through report after report on each strategic item

What is in a dashboard? The following are key items that are essential in any organization's dashboard.

**Measurable objectives.** List each strategic objective with a measure that makes sense. For example, "achieve 90 percent overall member satisfaction." This makes it clear, measurable and achievable.

**Core competencies.** List the organization's core competencies related to that strategic goal. These are core competencies that were identified during the strategic planning session. Tying goals to core competencies brings resources that are currently in place to achieve that specific goal.

**Long-term and short-term goals.** List out and identify that specific goal's short-term and long-term action plans. For example, "short-term: establish training on member needs and expectations" and "long-term: reinforce member focus at each level of the organization."

**Human-resource plans.** What is it going to take in terms of staff time and consultants to achieve the goals and objectives set? For example, "improve staff training on members' needs, requirements, and expectations."

**Key performance indicators.** List your actual and future KPIs. For example, "in 2012, achieve a 90 percent customer satisfaction score; in 2013, achieve a 92 percent customer satisfaction score; and in 2016, achieve a 94 percent customer satisfaction score." Listing your KPIs and progressively improving them enables the organization to achieve levels on a year-by-year or even quarter-by-quarter basis.

**Outcomes, measures, and results.** Finally, list your outcomes, measures, and results in your last column. What this means is that there are supporting charts and graphs that support your progress to the plan in each area. This visual approach allows an at-a-glance view of progress to the goals.

Taking your strategic plan from the drawing board to the dashboard is very doable and required in order to achieve the goals and objectives set during the strategic planning session. Make it simple to start and build on it every year. There are plenty of [dashboard samples](#) online and from your colleagues. There is no need to recreate the wheel when samples already exist. As the English cleric Charles Caleb Colton once said, "imitation is the sincerest form of flattery." Flatter a colleague today.

*Bill Pawlucy, MPA, CAE, is founder of Association Options, Inc. a company that focuses on practical strategic planning (corporate and nonprofit), management assessments, Baldrige Award process implementation, AMC search and evaluation, facilitation, and governance modeling. He is also the executive director of the International Association of Interviewers and is an appointee to the U.S. Department of Commerce Board of Examiners for the Baldrige Presidential Award. Website: [www.associationoptions.com](http://www.associationoptions.com)*

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## **Agenda**

### *Reflecting Strategic Goals*

Welcome

Chairman

Approval of Minutes

Secretary

Financial Report

Treasurer

#### **Strategic Goals**

#### **Committee Proposals**

##### **I. Advocacy**

GR Committee

PAC

##### **II. Membership Service/Satisfaction**

Membership Committee

Value Proposition Task Force

##### **III. Communications and PR**

PR Committee

PR Consultant

##### **IV. Education and Training**

Certification Committee

Professional Development

Old Business

Chairman

New Business

Chairman

Adjournment

Chairman

**Mission Statement** – To protect and advance the industry for the benefit of.....

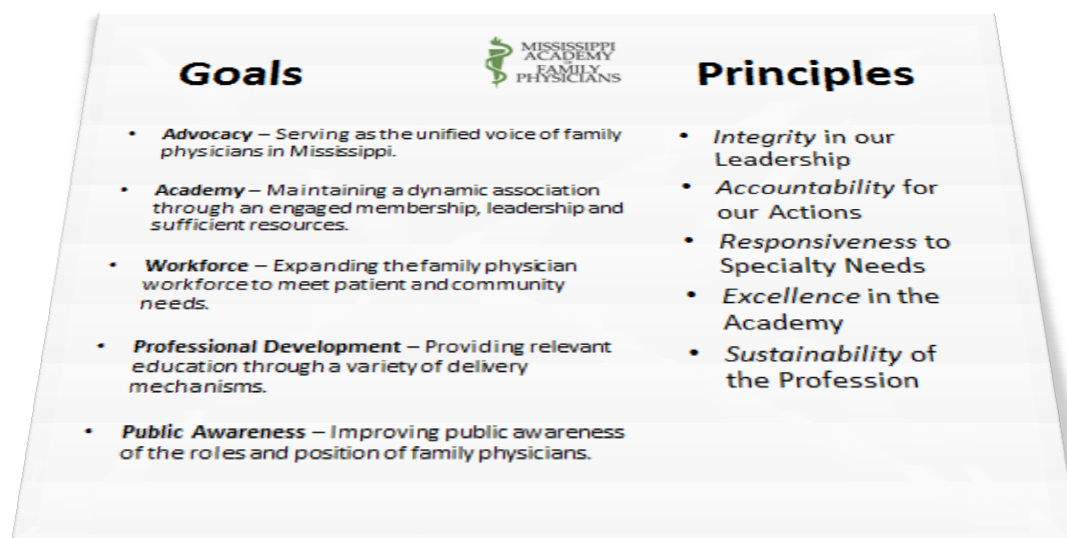
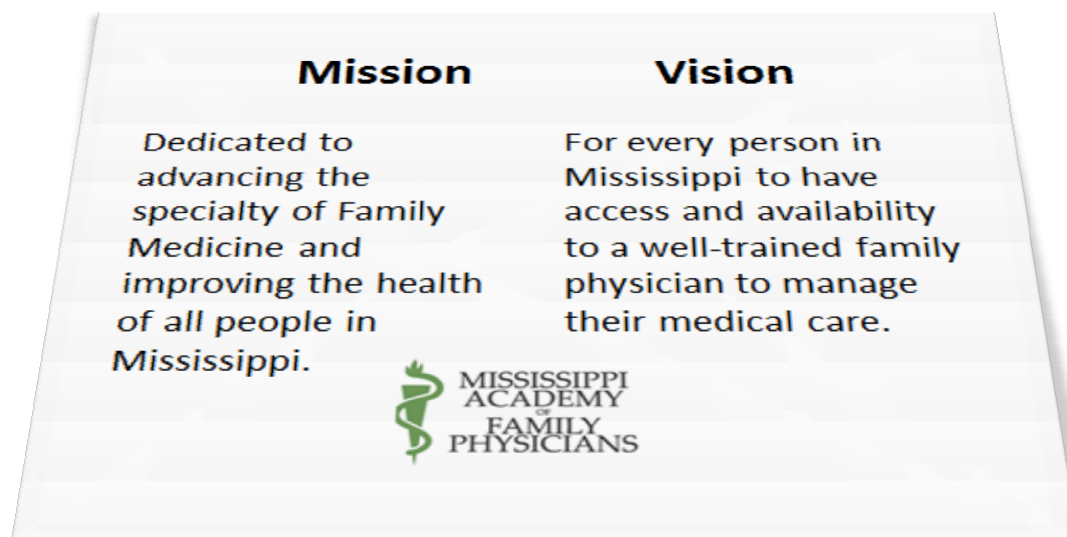
**Conflict of Interest** – Should a conflict of interest arise, either real or perceived, please bring it to the attention of the chairman.

**Antitrust Avoidance Statement** – No discussions shall be held that may infer or lead to antitrust violations.

Agenda Sample Aligned with Goals-Mission 5-11.docx

## Strategic Plan Business Card format

Keep the strategic plan in the forefront of leaders and stakeholders by creating a business card. Inexpensive to print and easy for leadership to promote the organization by having the mission and goals in their wallets.



# SAMPLE

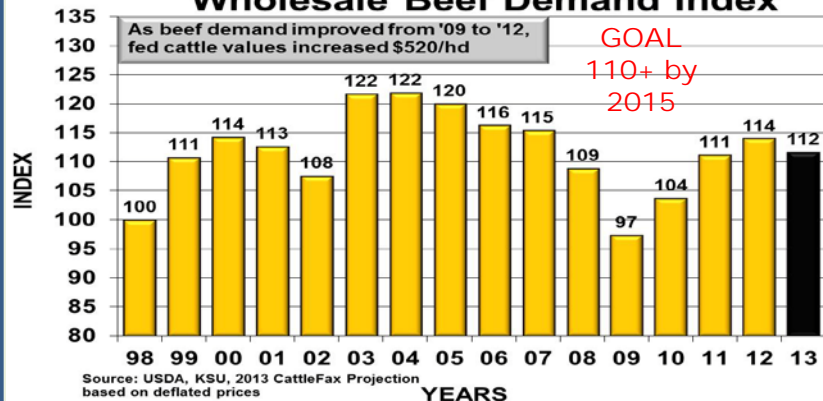


Through April 2013

## High Level Dashboard – April 2013

Current Restaurant Members (Month-in-Line)	1,485 Apr 2013	1,442 Apr 2012	+43	+3.0%	▲
Current Restaurant Units (Month-in-Time)	3,598 Apr 2013	3,478 Apr 2012	+120	+3.5%	▲
Restaurant Members (YTD)	703 YTD 2013	651 YTD 2012	+52	+8.0%	▲
Restaurant Member Units (YTD)	1,989 YTD 2013	1,897 YTD 2012	+92	+4.8%	▲
Avg Restaurant Member Dues (YTD)	\$738 YTD 2013	\$761 YTD 2012	-\$23	-3.0%	▼
Total Membership Sales (Active, Allied & Non Profit)	\$567,377 YTD 2013	\$537,800 YTD 2012	+\$29,577	+5.5%	▲
Total Revenue (Budget)	\$926,143 YTD Actual	\$893,761 YTD Budget	+\$32,382	+3.6%	▲
Total Expenditures (Budget)	\$843,065 YTD Actual	\$864,920 YTD Budget	-\$21,855	-2.5%	▲
Education Certifications (YTD)	957 YTD 2013	969 YTD 2012	-12	-1.2%	▼
Twitter "Followers"	1,441 Apr 2013	1,380 Mar 2013	+61	+4.4%	▲
Facebook "Likes"	1,359 Apr 2013	1,350 Mar 2013	+9	+0.7%	▲
PAC Net Income (YTD MARCH 2013)	\$11,421 YTD MARCH 2013	\$16,937 YTD MARCH Budget	-\$5,516	-32.6%	▼

## Wholesale Beef Demand Index



## Core Strategy – Capitalize on Global Growth Opportunities

**GOAL:** Increase the value of exports 25% (total export value divided by number of fed cattle slaughtered). *Goal revised from \$191 to \$252 by LRP Advisory Group; April 2013.*

**Update:**

Year	Value/Head
2008	\$133
2009	\$118
2010	\$153
2011	\$206
2012	\$217

GOAL 2015 \$252

Source: USMEF; value w/o hide

## Core Strategy – Strengthen the Image of Beef and the Beef Industry

**GOAL:** Increase the Consumer Image Index measure from 17% to 20% of consumers saying the positives of how cattle are raised for food strongly outweigh the negatives.

**Update:**

Year	Value/Head
2012 Benchmark	17%

GOAL 2015 20%

Source: Beef Checkoff CII Study

## Core Strategy – Position the U.S. Cow Herd for Growth

**GOAL:** Increase bred heifer retention to 18% while stabilizing U.S. beef production at a minimum of 26 billion lbs.

**Update:**

Year	Heifer retention	U.S. production
'10	17.4%	26 b lbs.
'11	16.7%	26.2 b lbs.
'12	17.4%	25.9 lbs.

GOALS 2015 (18.0%)  
2015 (26 b lbs.)

Source: CattleFax

## Core Strategy – Protect and Enhance our Freedom to Operate

**GOAL:** Decrease % saying regulations imposed on business make it more and more difficult to operate freely.

**Update:**

Year	Value/Head
2011	76%
2012	76%

GOAL 2015 (72%)

Source: 2012 CBB Producer Survey

## Core Strategy – Improve Industry Trust, Openness and Relationships

**GOAL:** Increase perceptions of industry trust and openness.

**Update:**

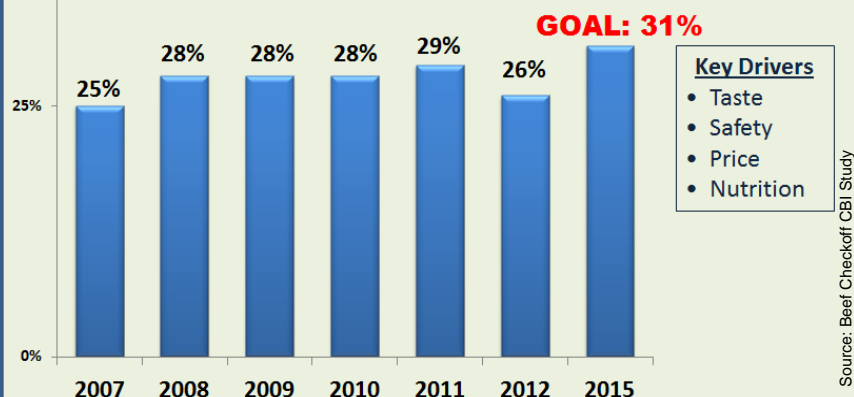
Year	Value/Head
2011	84%
2012	91%

GOALS 2015 (86%)  
2015 (67%)

Source: 2012 CBB Producer Survey

## Core Strategy – Improve Domestic Consumer Preference for Beef

**GOAL:** Increase the CBI preference measure from benchmark 28% in 2010 to 31% by EOY 2015 (Percentage of consumers stating the positives of beef strongly outweigh the negatives)



## Critical Success Factors

- Develop a resourcing plan to achieve desired outcomes of the Long Range Plan (checkoff and non-checkoff)
- Adopt a practical and effective industry-wide animal disease traceability program.

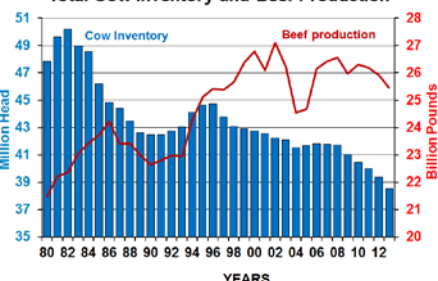
## 2013 – Key Trends Impacting the Food Production Chain

- Trend 1** Rising middle classes in developing countries demand more protein and produce while the U.S. faces lingering economic insecurity and agriculture feels societal pressure to change practices
- Trend 2** Big data emerges as powerful source of value generation from farm to retail
- Trend 3** Game changers: science, technology and the pressure to contain health care costs
- Trend 4** Evolving consumer definitions of value ramp up demand opportunities

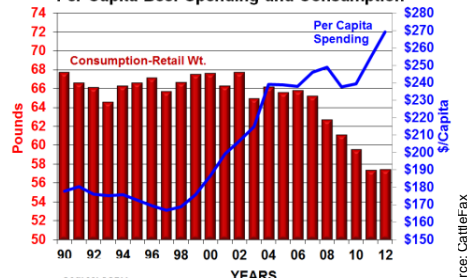
Source: Food Foresight, Nuffer, Smith, Tucker, Inc. April 2013 (updated annually)

## Inventory, Production, Spending and Consumption

Total Cow Inventory and Beef Production



Per Capita Beef Spending and Consumption

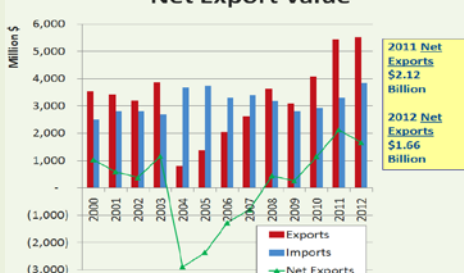


- As the cow herd declines, beef production has become increasingly more difficult to maintain.

- While per capita consumption continues to decline, spending continues to increase due to rising prices.

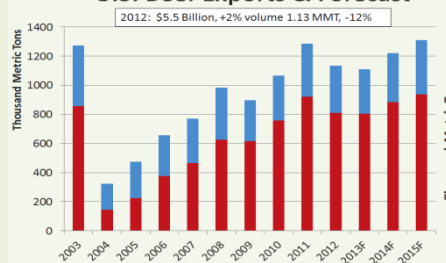
## International Markets

Net Export Value



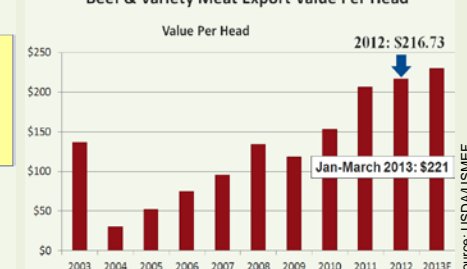
- The U.S. was once again a net exporter in 2012.

U.S. Beef Exports & Forecast



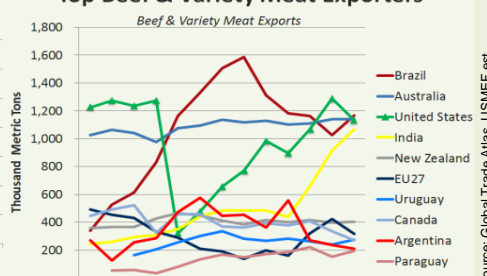
- U.S. beef exports continue positive recovery.

Beef & Variety Meat Export Value Per Head

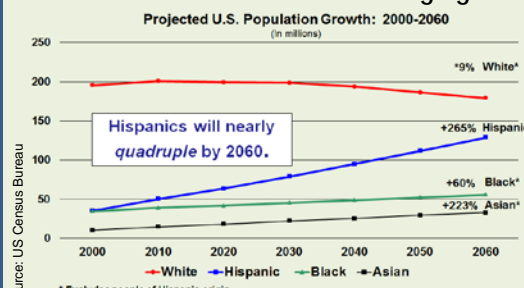


- Value per head slaughtered continues to increase.

Top Beef & Variety Meat Exporters

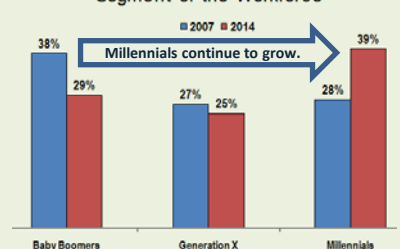


## The Changing U.S. Consumer



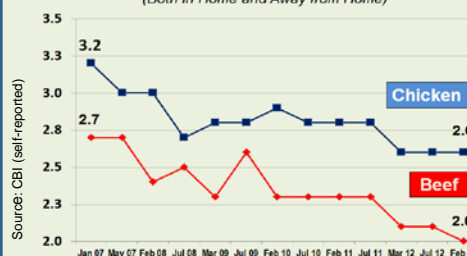
- The U.S. population continues to evolve ethnically and demographically; Hispanics continue to increase at an accelerated rate. By 2014, Millennials will become the largest segment of the workforce.

Millennials to Replace Boomers as Largest Segment of the Workforce



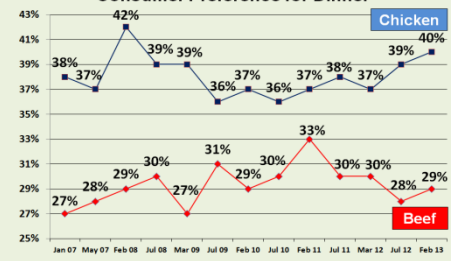
## Domestic Beef versus Chicken

Past Week Average Number of Servings (Both In Home and Away from Home)



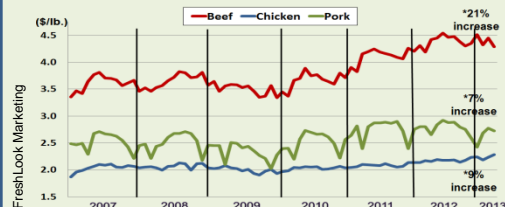
- The gap between beef and chicken servings has declined; beef has lost ground on stated preference.

Consumer Preference for Dinner



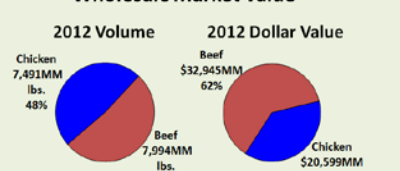
## Retail and Foodservice

Average Retail Price per Pound



- Beef's average retail price/lb. has increased at a greater rate than chicken or pork.

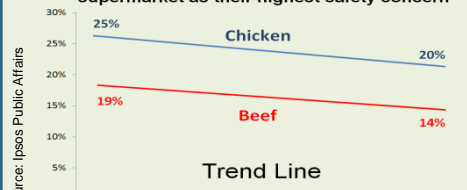
Beef and Chicken Foodservice Wholesale Market Value



- While wholesale volume of beef and chicken is similar, beef's dollar value is considerably higher.

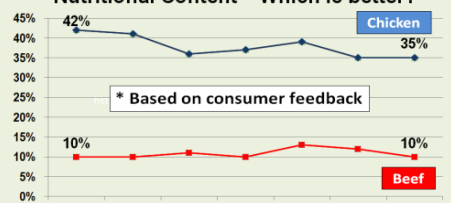
## Safety & Nutrition

Percent of consumers citing beef or chicken in the supermarket as their highest safety concern



- Concerns about beef and chicken are both declining.

Nutritional Content – Which is better?



- Beef trails chicken on perceptions of nutritional content.

# Balanced Scorecard

SAMPLE



Measurement Summary

Three-Year Strategic Targets

May 2012

STRATEGIC OBJECTIVES      MEASUREMENTS      FREQUENCY      LEADER      2012 TARGET      RESULTS YTD      % YTD GOAL

Supportive Stakeholders	Business Leadership	Progress Toward Priority Policy Goals (pg. 1)	q	Carmen	55%	65.00%	🟢	118%
		Member Engagement Growth - Core (pg. 1)	q	Shawna	20%	13.75%	🟡	68%
		Member Engagement Growth - Top Investors (pg. 1)	q	Shawna	50%	42.37%	🟡	83%
		Top Investors (pg. 1)	m	Jeremy	400	369	🟢	97%
		Chamber Membership (pg. 2)	m	Steve	2,500	2123	🟢	92%
	Job Creation and Entrepreneurship	New Jobs (pg. 2)	m	Eileen	4,000	1,548	🟢	111%
		Average Salary	m	Eileen	\$42,000	\$ 43,209	🟢	108%
		Located/Funded Projects	m	Eileen	100	34	🟢	110%
		Capital Secured (pg. 3)	m	Bobby	\$10,000,000	\$ 3,076,000	🟡	74%
		New Capital Investment	m	Eileen	\$210,000,000	\$ 99,308,000	🟢	131%
Percent of Deals Funded by Angel Group		m	Bobby	50%	40.00%	🟡	80%	
Human Capital	Talent Index (pg. 4)	q	Kathy	TBD - Q3		🔴	0%	
	# of Adults with a Bachelors Degree	q	Kathy	1,500		🔴	0%	
Global Opportunity	# of GLI Member Companies Exporting (pg. 4)	q	Eileen	TBD - Q1		🔴	0%	
	# of Member Companies Entering New Global Markets (pg. 4)	q	Eileen	TBD - Q1		🔴	0%	
Healthy	Profitable Market-Driven Revenue	Sponsorship and Advertising Revenue (pg. 5)	m	Shawna	\$749,000	\$ 376,328	🟢	86%
		Net Products & Services Revenue (pg. 5)	m	Shawna	\$494,000	\$ 347,851	🟢	93%
		New Product Net Revenue (pg. 5)	m	Shawna	\$21,000	\$ 4,792	🟡	61%
Purpose-Driven Investment	Top Investment Portfolio (pg. 6)	m	Jeremy	\$3,515,250	\$ 1,249,545	🟢	89%	
	Grants & Gifts Development (pg. 6)	m	Jeremy	\$788,000	\$ 279,694	🟢	154%	
	Government Contracts (pg. 6)	m	Mark	\$1,252,700	\$ 521,959	🟢	100%	
Positive Net Finances	Net Worth (Assets) (pg. 6)	m	Mark	\$1,475,000	\$ 1,156,518	🟢	97%	
	Net Profit (Activities) (pg. 7)	m	Mark	\$3,000	\$ (264,788)	🟡	80%	
Raving	Valued Connections	Strong Supporter (pg. 7)	m	Jennifer	52%	32.80%	🟡	65%
Effective Management	Engaged and Inspired People	Employee Engagement (pg. 8)	a	Connie	100%		🔴	0%
		Investment in Development (pg. 8)	q	Connie	\$45,000	\$16,613	🔴	37%
	Execute a Growth Strategy	Fit (pg. 8)	m	Connie	75%	72.00%	🟢	96%
		% of Green on BSC (pg. 8)	q	Tracee	84%	50.00%	🟡	68%
Learning & Growth Organization	Enabling Technology and Knowledge	Technology Plan (pg. 9)	q	Susan	100%	60.00%	🟡	60%
		Knowledge-On-Tap	q	Susan	100%	60.00%	🟡	60%
	Inclusive	Staff Diversity Reflective of Community (pg. 9)	m	Connie	85%	70.50%	🟡	83%
		Supplier Diversity Reflective of Community (pg. 9)	q	Christy	100%	83.48%	🟢	84%
		Customer Diversity Reflective of Community (pg. 9)	m	Erin	100%	87.83%	🟢	88%
		Board Diversity Reflective of Community (pg. 10)	a	Tracee	100%	64.32%	🟡	64%
	Collaborative	Collaboration Assessment (pg. 10)	q	Erin	100%	on hold		
	Inquisitive	Company Investment in Ideas (pg. 10)	q	Erin	100%	on hold		
		Curiosity Points (pg. 10)	q	Erin	100%	on hold		

Civic Innovation & Entrepreneurship

Sustainable Development

Strength Based Approach

Color Coding:

- 84% or above
- 56-83%
- 55% or less

Civic Innovation & Entrepreneurship

Sustainable Development

Strength Based Approach